



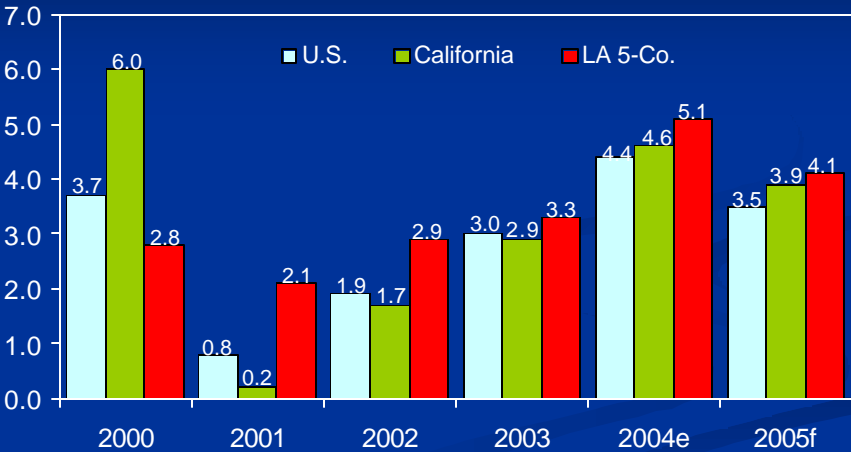
GOODS MOVEMENT & PORTS

Caltrans Headquarters
Los Angeles, California

Jack Kyser
Chief Economist

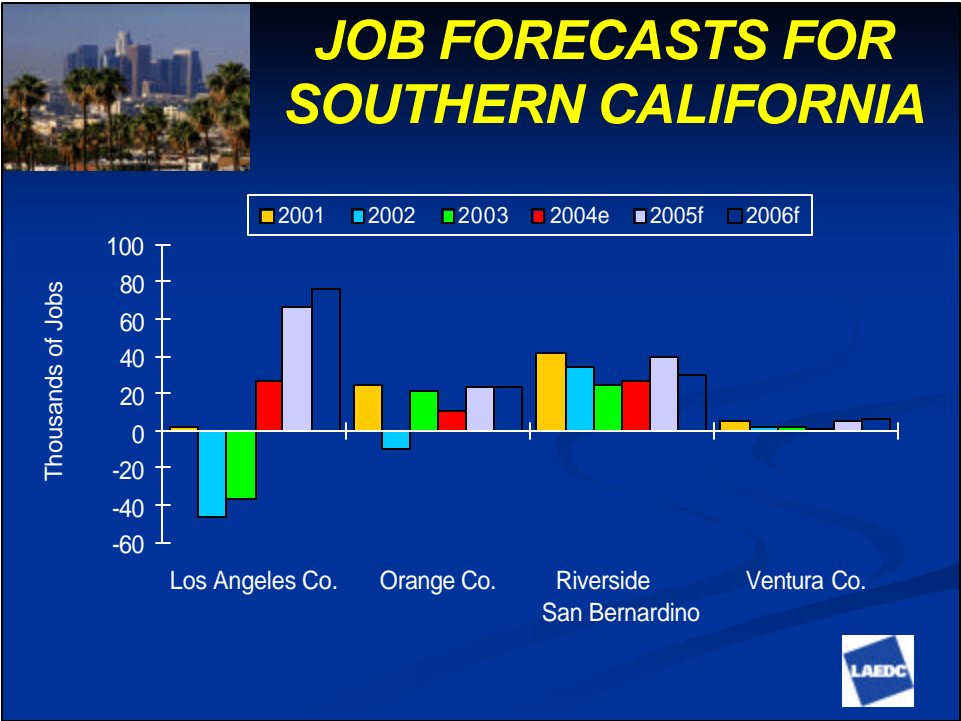
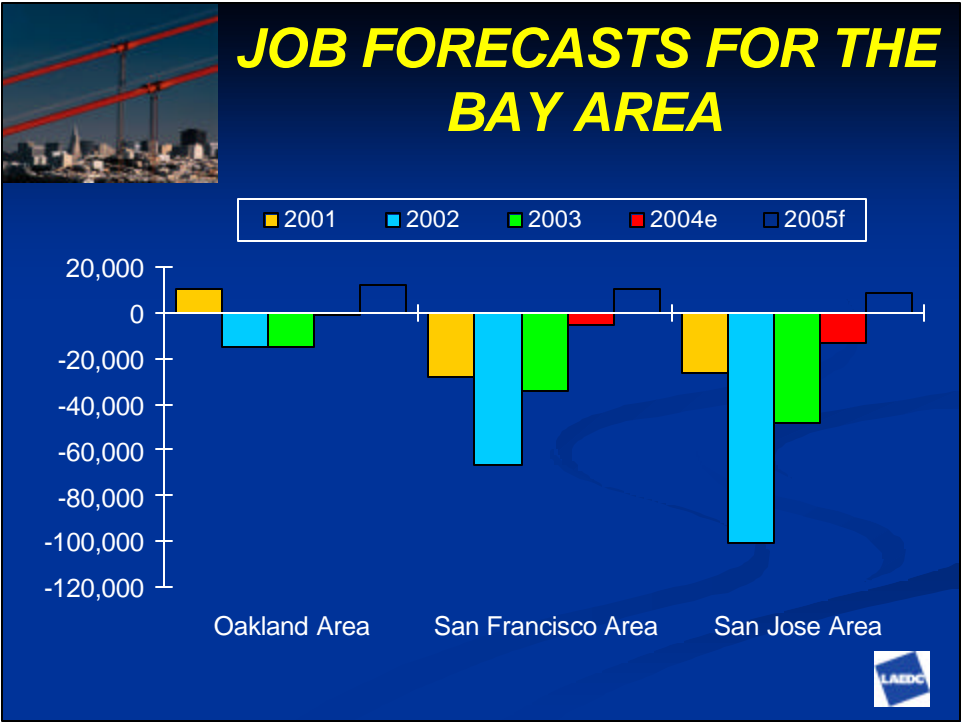
January 27, 2005

GROSS PRODUCT
(% change, adjusted for inflation)



Sources: BEA, CA Dept. of Finance, regional estimates by LAEDC





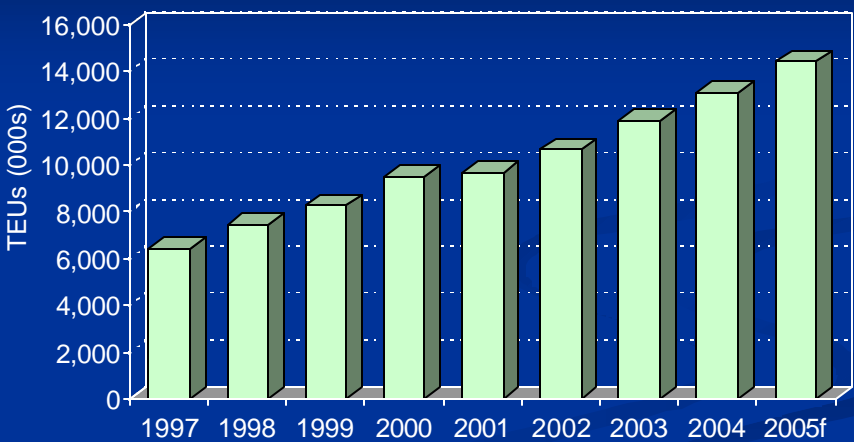


WHAT TO WATCH FOR

- BRAC
- Budget
- Business climate
- Congestion



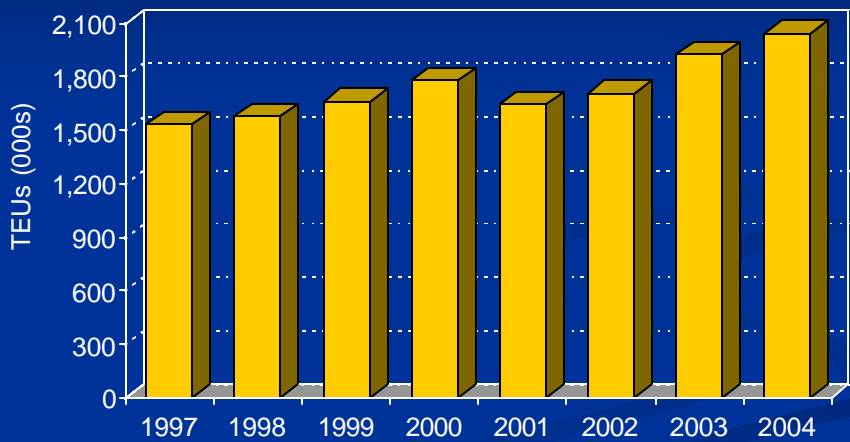
TOTAL CARGO HANDLED AT THE LA/LB PORTS



Sources: Ports of Los Angeles and Long Beach,
forecast by LAEDC



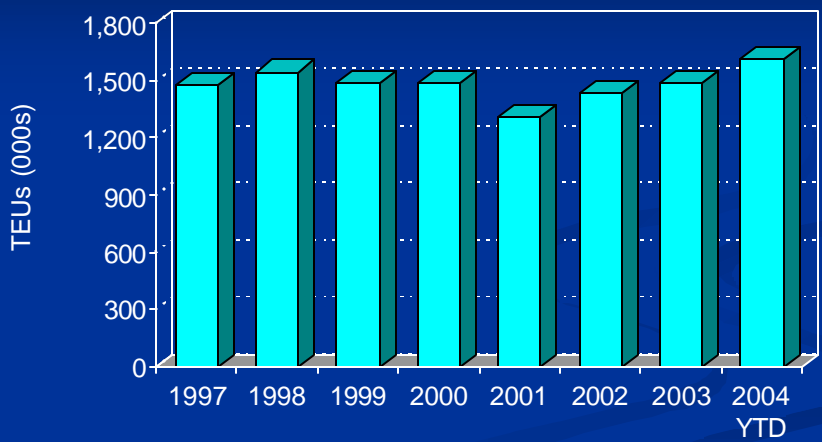
**TOTAL CARGO HANDLED AT THE
PORT OF OAKLAND**



Source: Port of Oakland



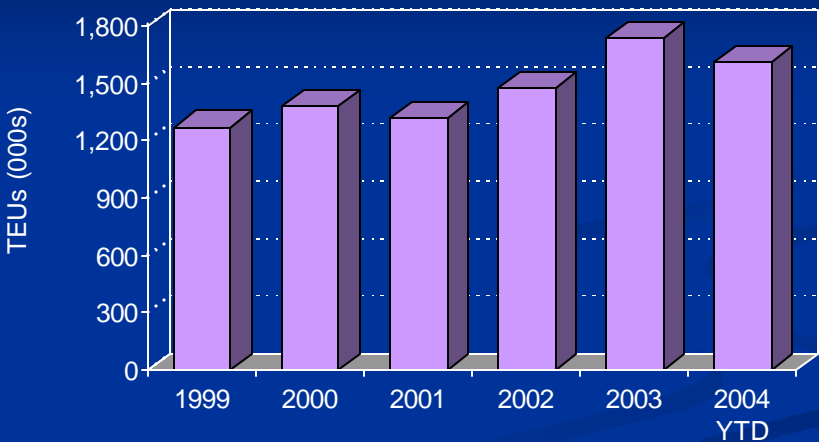
**TOTAL CARGO HANDLED AT THE
PORT OF SEATTLE**



Source: Port of Seattle



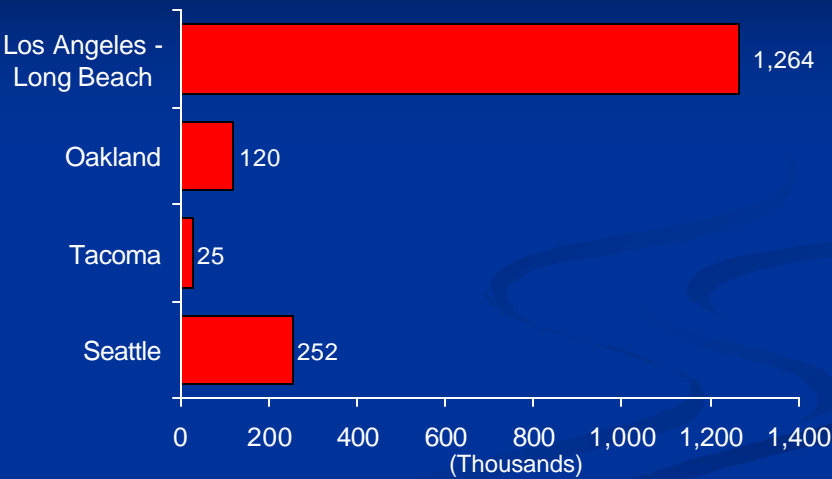
**TOTAL CARGO HANDLED AT THE
PORT OF TACOMA**



Source: Port of Tacoma



**CHANGE IN CONTAINER VOLUME --
MAJOR WEST COAST PORTS 2003-2004**



Sources: Ports of Los Angeles, Long Beach, Oakland, Tacoma, and Seattle



ISSUES FOR INTERNATIONAL TRADE

- Rapid growth in imports, especially from China
- Introduction of “mega-ships” (8,000+ TEUs)
- International trade fingered as major polluter
- Lack of investment in highways and rail
- No overall approach to goods movement -- U.S. & CA
- Cost of building new facilities -- how to fund?




THE RETAIL “DIRTY DOZEN” TOP IMPORTERS BASED ON TEU VOLUME 2003

- Wal-Mart Stores Inc.
- The Home Depot Inc.
- Target Corp.
- Lowe’s Cos.
- Kmart Corp.
- IKEA International A/S
- Payless Shoe Source Inc.
- Pier 1 Imports Inc.
- Big Lots Inc.
- Toys ‘R Us Inc.
- Limited Brands Inc.
- Michaels Stores

Source: Journal of Commerce





COMPETITIVE SITUATION OF ECONOMIC BASE

	Structural Change	Intense Competition	Congestion Impacted
Tourism	X	X	X
Direct int'l trade	X	X	X
Technology	X	X	X
Professional bus svcs.		X	
Wholesale trade			X
Health svcs.	X	X	
Motion pic/TV	X	X	X
Financial svcs.	X	X	
Agric/food products		X	X
Apparel	X	X	X
Fabricated metals		X	
Colleges/universities	?	X	
Furniture		X	X
Auto		X	X
U.S. DoD			
Jewelry			
Petroleum			
Toys		X	X

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